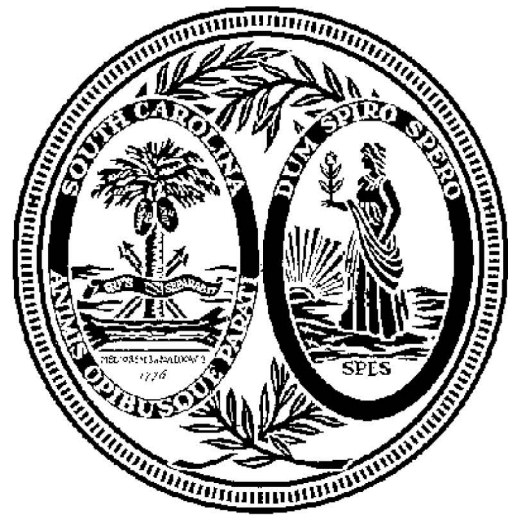


Lee County Base Labor Market Analysis



South Carolina
Department of
Commerce
Labor Market Information

TABLE OF CONTENTS

EXECUTIVE SUMMARY	5
POPULATION	6
Growth.....	6
LABORSHED.....	7
Characteristics of Workers	7
INCOME	9
Per Capita Income	9
Wages by Industry	10
Wages by Occupation.....	11
EDUCATION	12
High School Graduates.....	12
Higher Education Graduates.....	13
OCCUPATIONS.....	14
Occupational Projections.....	14
Occupational Education Requirements.....	15
INDUSTRY	16
Businesses by Sector.....	16
Growth in Number of Businesses	17
Employment by Sector	18
Industry Analysis	19
MOVING FORWARD.....	20
Appendix A: Occupational Projections	
Appendix B: Businesses by 3-digit NAICS Codes	
Appendix C: Employment by Industry Sector	

EXECUTIVE SUMMARY

Population

Lee County's population growth has been slower than the state's in recent years.

Future growth is expected to be slower as well.

Not quite half of Lee County's workers live within the county.

Over 10% of Lee County's workers come from Sumter County.

Income

Per capita income growth has been faster than the state and nation.

However, Lee County's per capita income remained below state and national levels from 1996 to 2006.

Lee County's average wages are higher than the state's for these occupation groups: community and social services; arts, design, entertainment, sports and media; and production.

Education

The number of degrees awarded by area post-secondary institutions has increased.

The greatest increase has been in the area of business management.

Occupations

Almost all occupational groups are expected to have faster growth in Lee County than in the state.

Requirements for Lee County's workers are expected to grow in the following levels of education and experience:

Short-term on-the-job training, moderate-term on-the-job training, work experience in a related field, postsecondary vocational award, and associate's degree.

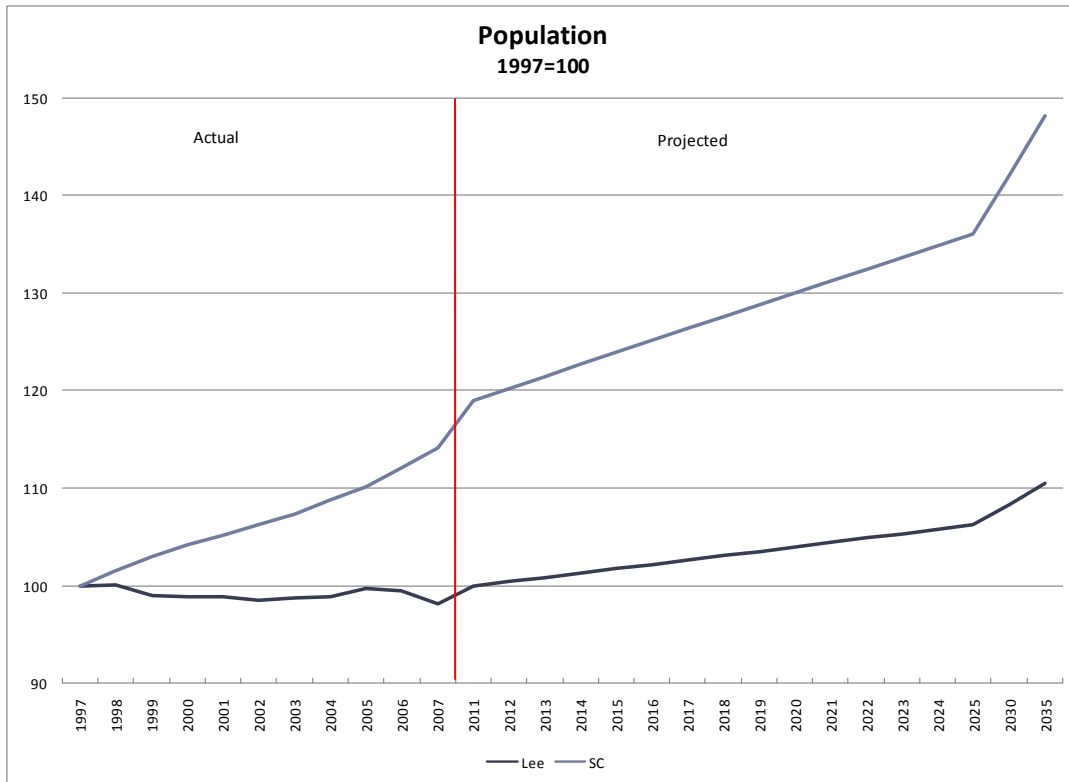
Industry

Based on available data, a sector rated as having high potential in Lee County is truck transportation.

POPULATION

Growth

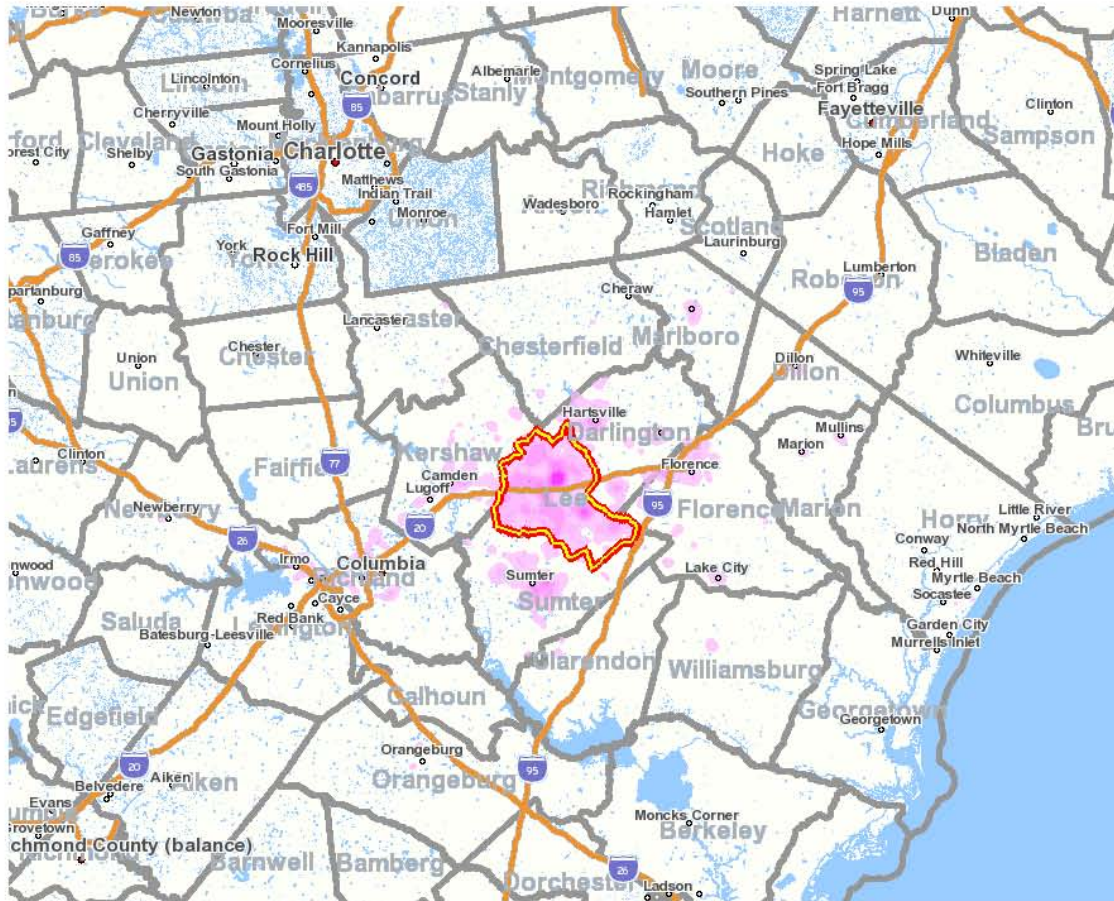
Lee County's 2007 population was 19,988. The county population has grown by 1.8% since 1997, compared to 14.2% growth for South Carolina. Lee's future population growth is expected to be slower than the state's.



Source: U.S. Census Bureau (estimates) and SC Budget & Control Board/Office of Research and Statistics (projections).

LABORSHED

The map below shows where Lee County workers come from (in 2006, latest available data). As can be seen, Lee County draws workers mainly from nearby areas.



Source: U.S. Census Bureau, Local Employment Dynamics.

Characteristics of Workers

Age of Workers:

30 or younger	19.2%
31 to 54	60.8%
55 or older	10.0%

Earnings of Workers:

\$1,200 per month or less	34.2%
\$1,201 to \$3,400 per month	47.4%
More than \$3,400 per month	18.4%

States Where Workers Live:

South Carolina	98.9%
North Carolina	0.7%
All other locations	0.4%

Counties Where Workers Live:

Lee, SC	46.6%
Sumter, SC	10.3%
Darlington, SC	8.3%
Kershaw, SC	6.0%
Florence, SC	5.8%
Richland, SC	4.7%
Marlboro, SC	1.5%
Lexington, SC	1.4%
Horry, SC	1.1%
Clarendon, SC	1.1%
All Other Locations	13.1%

Cities Where Workers Live:

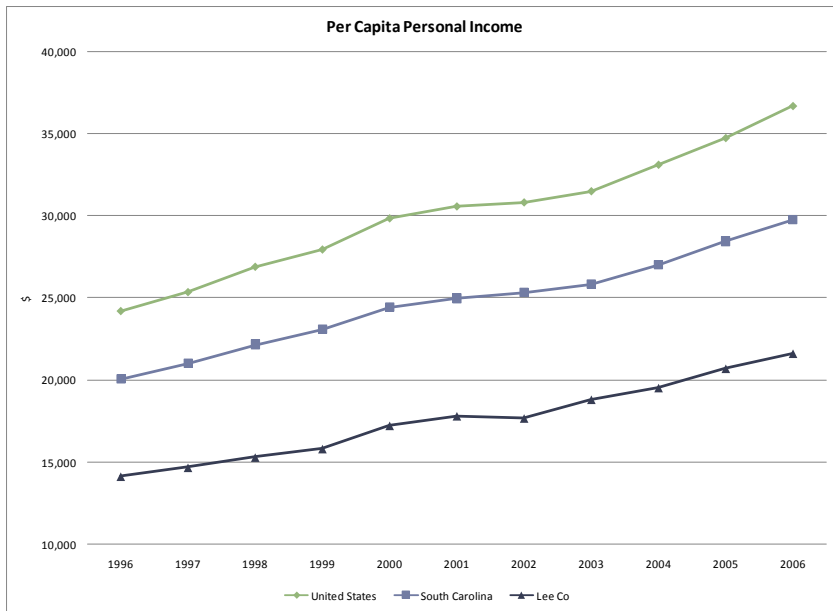
Bishopville, SC	11.5%
Sumter, SC	3.8%
Hartsville, SC	1.5%
Florence, SC	1.1%
Lynchburg, SC	0.8%
Columbia, SC	0.7%
Dentsville, SC	0.6%
Bennettsville, SC	0.6%
St. Andrews, SC	0.5%
Charleston, SC	0.5%
All Other Locations	78.4%

Source: U.S. Census Bureau, Local Employment Dynamics.

INCOME

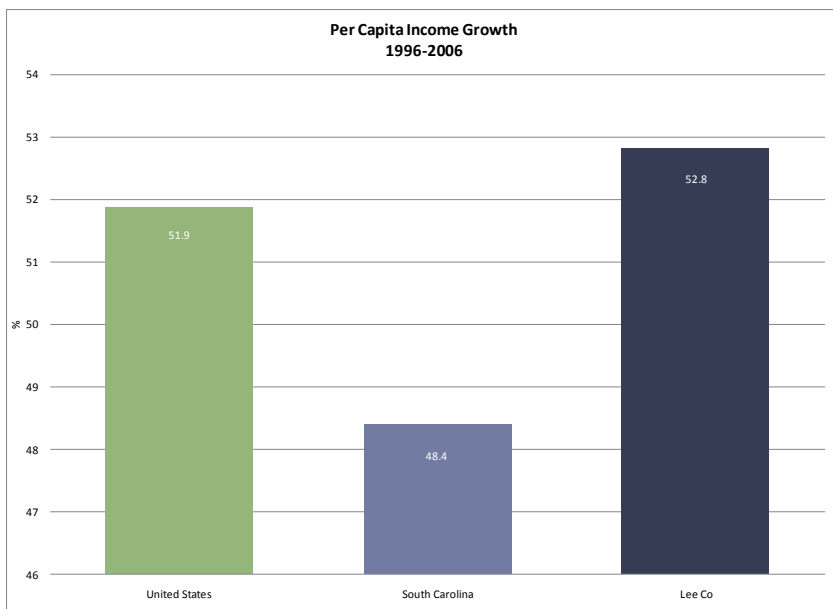
Per Capita Income

Lee County's per capita income has consistently been below state and national levels.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Lee County's per capita income has grown faster than South Carolina's and the nation's.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Wages by Industry

Lee County's average wages are well below those of South Carolina (\$544 vs. \$680 in 2007). Average wages were up 20% in Lee County over the past five years, compared to 18% for the state. All major sectors had growth except for construction.

Industry	NAICS Code	2007 Average Weekly Wage (\$)	2002 Average Weekly Wage (\$)	% Change
Total, Private and Government		544	453	20
Construction	23	344	386	-11
Manufacturing	31-33	901	773	17
Retail Trade	44-45	351	282	24
Transportation and Warehousing	48-49	542	538	1
Information	51	NA	NA	
Finance and Insurance	52	600	482	24
Real Estate and Rental and Leasing	53	499	204	145
Administration & Support & Waste Management & Remediation Services	56	526	328	60
Arts, Entertainment, and Recreation	71	NA	NA	
Accommodation and Food Services	72	NA	NA	
Other Services (Except Public Administration)	81	NA	NA	
Federal Government		786	656	20
State Government		636	553	15
Local Government		537	462	16

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

Wages by Occupation

Average wages in Lee County are higher than the state average in the following occupational groups:

- Community and social services
- Arts, design, entertainment, sports and media
- Production

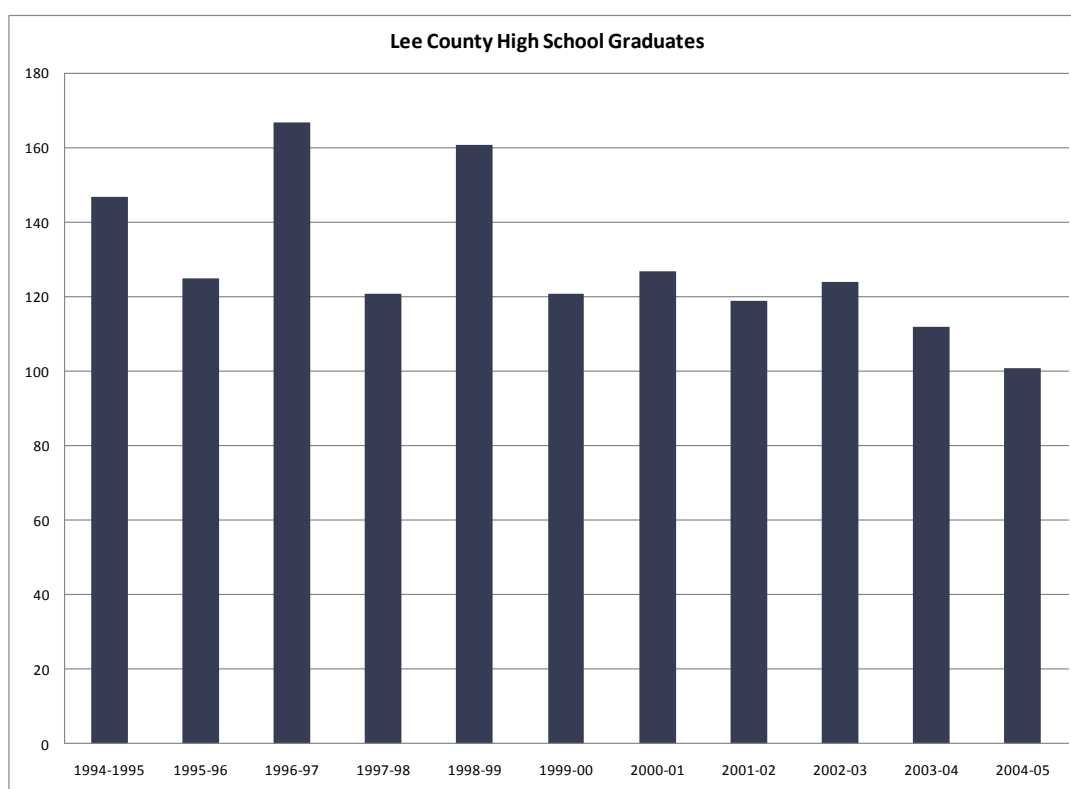
Occupation	2007 Lee County Median Hourly Wage (\$)	2007 SC Median Hourly Wage (\$)
Management occupations	13.93	28.78
Business and financial operations occupations	12.74	20.28
Computer and mathematical science occupations	19.66	26.20
Architecture and engineering occupations	21.62	30.22
Life, physical and social science occupations	15.10	22.76
Community and social services occupations	13.41	13.18
Legal occupations	22.80	30.68
Education, training and library occupations	19.89	24.42
Arts, design, entertainment, sports and media occupations	14.71	12.66
Healthcare practitioners and technical occupations	26.80	30.64
Healthcare support occupations	8.50	10.55
Protective service occupations	13.16	13.87
Food preparation and serving related occupations	6.90	7.90
Building and grounds cleaning and maintenance occupations	7.09	8.42
Personal care and service occupations	7.21	8.39
Sales and related occupations	10.54	13.48
Office and administrative support occupations	11.38	13.22
Farming, fishing, and forestry occupations	8.80	13.07
Construction and extraction occupations	10.33	16.51
Installation, maintenance and repair occupations	13.10	16.88
Production occupations	16.90	15.21
Transportation and material moving occupations	11.44	12.94

Source: *Economic Modeling Specialists, Inc.*

EDUCATION

High School Graduates

From 1995 to 2005 (latest data available), the number of Lee County students receiving high school diplomas fell by 46 (31%). In South Carolina, on the other hand, the number of high school diplomas increased 9% from 1995 to 2005. A total of 101 people received high school diplomas in Lee County in 2005. Lee County had 62 fewer 12th grade students in 2004-05 than in 1994-95. Also, the number of Lee County students not passing the exit exam who received a certificate of completion instead of a diploma increased by 14 (to 24) over the 1995-2005 period.



Source: National Center for Education Statistics.

Higher Education Graduates

Over 1,300 more students graduated from higher educational institutions in the Santee-Lynches area in 2006 than in 1996, an increase of 13%. The greatest numerical increase was in business management fields.

Program	1996	2006	Change	% Change
Agriculture, agriculture operations & related sciences	16	4	-12	-75
Area, ethnic, cultural & gender studies	19	26	7	37
Biological & biomedical sciences	434	458	24	6
Business, management, marketing & related support services	1,685	2,173	488	29
Communication, journalism & related programs	353	428	75	21
Computer & information sciences & support services	181	239	58	32
Construction trades	1	3	2	200
Education	1,262	1,205	-57	-5
Engineering technologies/technicians	123	160	37	30
Engineering	289	315	26	9
English language & literature/letters	310	276	-34	-11
Family & consumer sciences/human sciences	117	246	129	110
Foreign languages, literatures & linguistics	81	71	-10	-12
Health professions & related clinical sciences	1,236	1,330	94	8
Legal professions & studies	324	324	0	0
Liberal arts & sciences, general studies & humanities	672	391	-281	-42
Library science	185	200	15	8
Mathematics and statistics	129	99	-30	-23
Mechanic and repair technologies/technicians	106	248	142	134
Multi/interdisciplinary studies	37	86	49	132
Natural resources & conservation	15	3	-12	-80
Parks, recreation, leisure & fitness studies	125	240	115	92
Personal & culinary services	2	38	36	1,800
Philosophy & religious studies	30	52	22	73
Physical sciences	167	162	-5	-3
Precision production	89	99	10	11
Psychology	353	445	92	26
Public administration & social service professions	325	365	40	12
Security & protective services	359	343	-16	-4
Social sciences & history	719	823	104	14
Theology & religious vocations	284	338	54	19
Visual & performing arts	195	339	144	74
TOTAL	10,223	11,529	1,306	13

Source: National Center for Education Statistics (Integrated Post Secondary Education System).

Data for these schools: Allen University, Benedict College, Central Carolina Technical College, Claflin University, Coker College, Columbia College, Columbia International University, Florence-Darlington Technical College, Francis Marion University, Lutheran Theological Seminary, McLeod Regional Medical Center School of Medical Technology, Morris College, Northeastern Technical College, Orangeburg-Calhoun Technical College, South Carolina State University, South University, Southern Methodist College, University of South Carolina-Columbia, University of South Carolina-Lancaster, University of South Carolina-Sumter, Williamsburg Technical College.

OCCUPATIONS

Occupational Projections

Almost all occupational groups are projected to grow faster in Lee County than in the state.

See **Appendix A** for detailed occupational information.

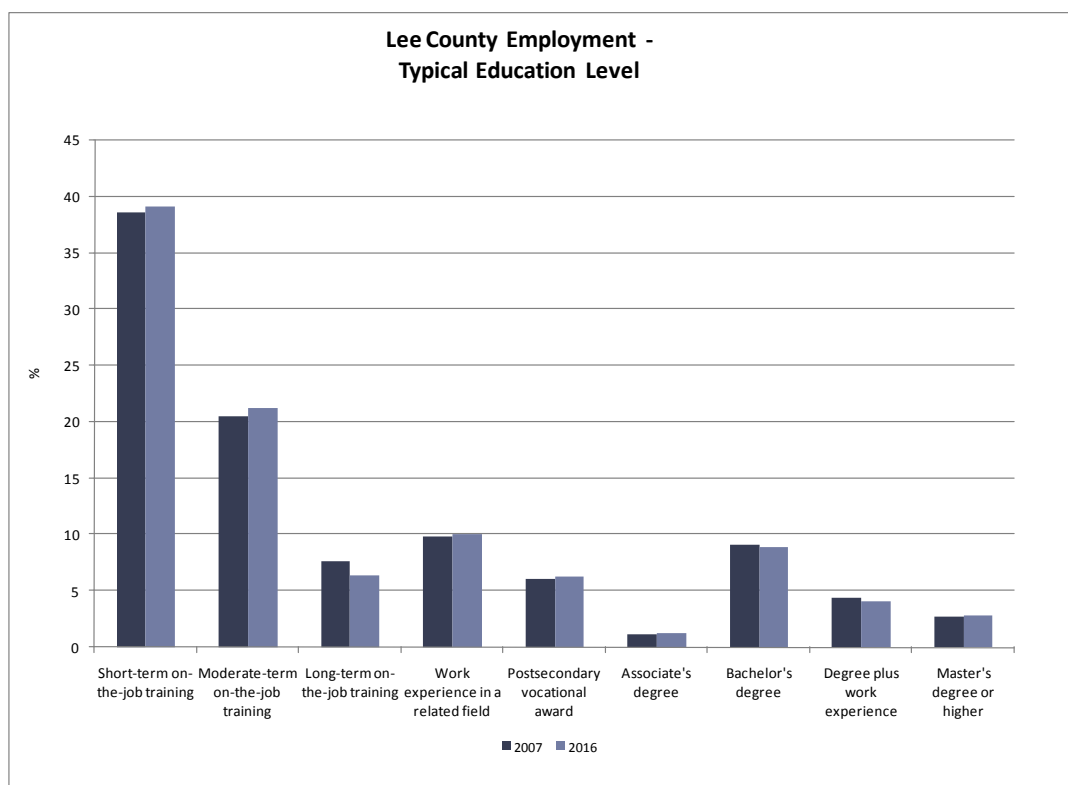
Occupation	2007-2016 Lee County Projected Growth (%)	2007-2016 SC Projected Growth (%)
Management occupations	15	17
Business and financial operations occupations	32	22
Computer and mathematical science occupations	29	23
Architecture and engineering occupations	29	15
Life, physical and social science occupations	28	15
Community and social services occupations	26	15
Legal occupations	30	21
Education, training and library occupations	23	16
Arts, design, entertainment, sports and media occupations	24	17
Healthcare practitioners and technical occupations	42	24
Healthcare support occupations	38	25
Protective service occupations	32	18
Food preparation and serving related occupations	25	13
Building and grounds cleaning and maintenance occupations	44	23
Personal care and service occupations	29	7
Sales and related occupations	24	19
Office and administrative support occupations	29	13
Farming, fishing and forestry occupations	23	16
Construction and extraction occupations	37	19
Installation, maintenance and repair occupations	32	17
Production occupations	47	10
Transportation and material moving occupations	37	11

Source: Economic Modeling Specialists, Inc.

Occupational Education Requirements

The trend for occupational growth shows that there will be growth in jobs across skill levels. Based on employment projections, Lee County is expected to see growth in requirements for the following specific levels of education and experience:

- Short-term on-the-job training
- Moderate-term on-the-job training
- Work experience in a related field
- Postsecondary vocational award
- Associate's degree



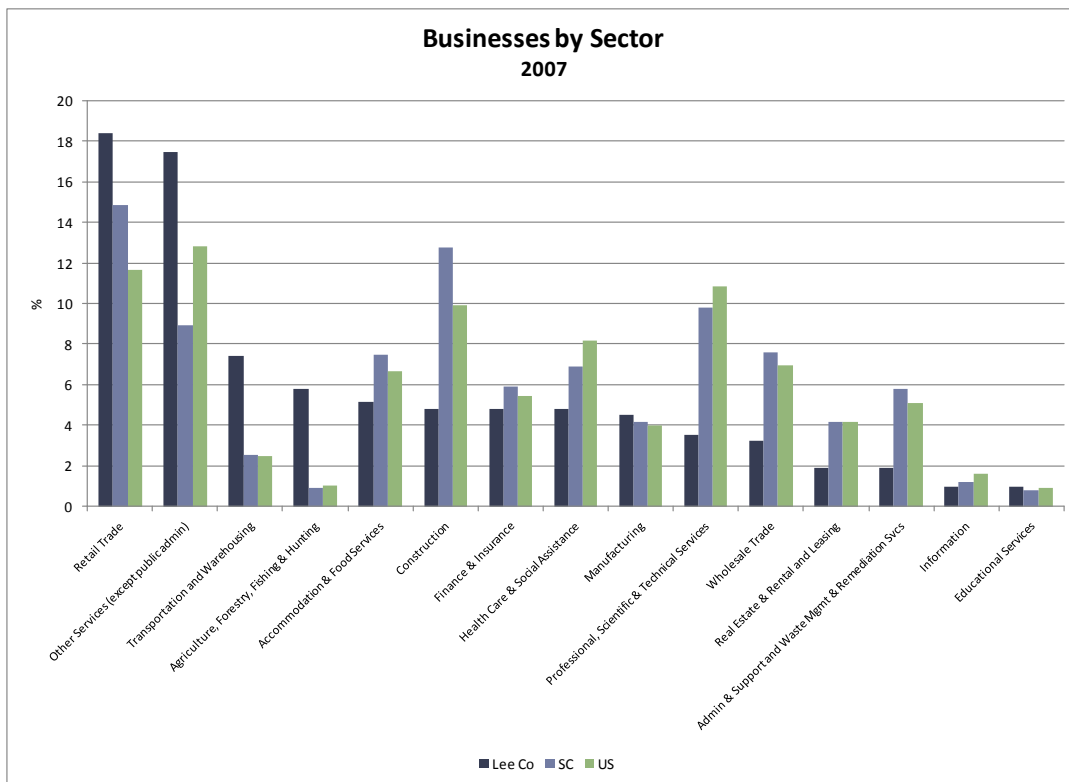
Source: Economic Modeling Specialists, Inc

INDUSTRY

Businesses by Sector

Lee County had higher percentages of businesses than South Carolina or the nation in the following sectors:

- Retail trade
- Other services
- Transportation and warehousing
- Agriculture and forestry
- Manufacturing
- Educational Services



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Growth in Number of Businesses

The number of private businesses in Lee County fell by 4% from 2002 to 2007, compared to a 2% drop for the state. For industry definitions, this analysis uses the North American Industry Classification System (NAICS), the U.S. standard for industry classification.

At the three-digit NAICS code level, based on available data, Lee County had higher growth in five industries compared to South Carolina and the U.S. Below is a list of those five industries along with their respective growth rates.

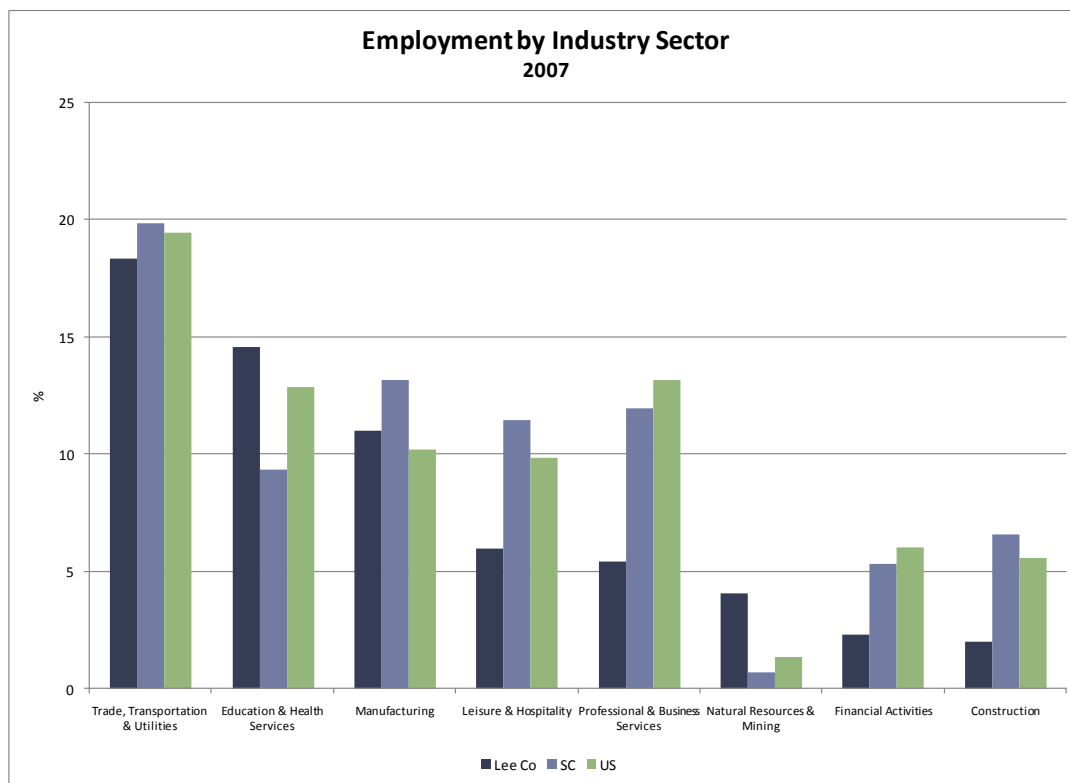
See **Appendix B** for information on all industries.

Industry	2002-2007 Growth (%)		
	Lee Co.	SC	US
Building material and garden equipment and supplies dealers	40.0	-8.8	0.9
Truck transportation	7.1	-5.1	5.4
Support activities for transportation	33.3	-6.0	7.9
Repair and maintenance	22.2	-18.3	-0.4
Private households	118.8	4.6	24.9

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Employment by Sector

Lee County has a larger than average share of its jobs in education and health services and natural resources and mining.



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Industry Analysis

Screening Criteria

Industry sectors were rated on six factors:

- | | |
|------------------------------------|---------------------------------|
| • 2002-2007 employment growth | Competitive effect ¹ |
| • 2002-2007 employment growth rate | Average annual wage |
| • Location quotient ² | Projected growth |

Using those factors, sectors were awarded “stars” based on meeting the following criteria:

- 2002-2007 employment growth of 25 or more (Did the sector add a significant number of jobs?)
- 2002-2007 employment growth rate greater than 0% (the county lost jobs over the period) (Did the sector add jobs?)
- Location quotient of at least 1.25 (Does the sector have a significant concentration in the county?)
- Competitive effect greater than 0 (Did the sector add jobs beyond national growth overall and in the sector?)
- Average annual wage greater than \$28,264 (2007 average for the county) (Does the sector pay wages greater than average for the county?)
- Average or above average projected growth (Is the sector expected to add jobs?)

Data Limitations

Because of Census and Bureau of Labor Statistics restrictions, information on detailed industry sectors is quite limited for smaller counties such as Lee. Therefore, this base analysis is not as comprehensive as those for larger areas. Further analysis can be conducted on growth occupations and using other resources in an attempt to obtain more detailed information on potential focus industries for Lee County. The Department of Commerce can assist in this supplemental analysis.

Industries of Note

Based on these criteria and available data, there are no “six star” or “five star” sectors in Lee County.

Industry sectors that generate wealth from outside the area are referred to as the region’s base economy. Base economy sectors are important to an area’s economic well-being. A sector which fits this base economy criteria, has above-average wages, has a high concentration in the area (as indicated by the location quotient), and is projected to grow is truck transportation.

Appendix C has information on all factors for all sectors for Lee County.

¹ *Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.*

² *Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county compared to the US; based on 2007 data.*

MOVING FORWARD

The South Carolina Department of Commerce appreciates the opportunity to provide this base analysis of Lee County's labor market. We hope that it will help in advancing the progress of Lee County's economic development.

What's been done so far?

This analysis identifies the region's assets—both current and future—at a macro level. Labor Market Information (LMI) at the S.C. Department of Commerce developed a Base Labor Analysis report providing an overview of the region's population, industries, occupations, and educational assets. Additionally, these findings were benchmarked against the state and the nation.

What's next?

Because local knowledge is required to interpret and apply the findings appropriately, the Lee Base Labor Analysis should be used with local stakeholders to identify and define key, targeted industry clusters. Some items to consider when defining these clusters may include the following.

1. *What is Lee's economic base?*

In order for an economy to grow, it must have a base (export) sector that generates wealth from beyond its borders. Industries in the economic base (manufacturing, scientific and technology services, warehouse and distribution, financial services, regional healthcare, etc.) typically provide occupations with higher pay and benefits as well as better human capital development and promotion opportunities. A successful economic base stimulates the development of the non-base sector (housing, schools, retail, restaurants, personal services, etc.). It also propels the local tax base which, in turn, provides support to community services.

2. *What are strategies to assist low-wage citizens in non-base economy jobs?*

Although the economic base is the driver for long-term growth in a region, implementable strategies for developing job opportunities for low-skilled individuals is a priority for community economic well-being. This need must also be kept in mind when defining target industry clusters.

3. *What other factors are vital to Lee and its community?*

Over and above pure economic considerations, what is important to the citizens of the Lee community? How does Lee want to be perceived? What quality of life issues affect Lee? These questions may impact the types of industries desired for the area.

How Labor Market Information at the S.C. Department of Commerce can help.

Once local stakeholders have identified key industry clusters vital to the future economic development of the region, LMI can provide more in-depth analysis of each of these industries, their occupations, business establishments, and educational requirements.

1. Detailed Industry Analysis

For each identified industry, LMI can develop a detailed analysis of each sector, including employment, projected growth, staffing patterns, location quotients, and employers. Additionally, the analysis will examine the largest, fastest growing, and declining sectors within the industry cluster.

2. Detailed Occupational Analysis

At this point, the occupations—classified by SOC codes—that make up each of the identified industry clusters can be analyzed in detail. This analysis will include employment, average earnings, educational requirements, projected growth, and completers from available local training programs. It will culminate in identifying gaps between the number of occupations required to sustain and advance industry growth and the number of skilled workers (as identified by educational requirements and program completers) available to fulfill these positions.

3. Identification of Implementable Recommendations

LMI will utilize the findings of the analyses to develop a set of implementable recommendations. These may include recommendations to align community college programs with economic development goals along with others. Finally, local knowledge will once again be called upon to review the findings and develop an action plan for the implementation of feasible solutions.

Appendix A: Occupational Projections for Lee County

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
11-3031	Financial managers	10	12	2	20	--	--	Degree plus work experience
11-9011	Farm, ranch, and other agricultural managers	51	49	-2	-4	4.12	5.86	Degree plus work experience
11-9012	Farmers and ranchers	249	243	-6	-2	4.12	5.85	Long-term on-the-job training
11-9021	Construction managers	22	31	9	41	0.86	10.76	Bachelor's degree
11-9032	Education administrators, elementary and secondary school	15	18	3	20	1.38	39.80	Degree plus work experience
11-9051	Food service managers	26	40	14	54	1.64	7.54	Work experience in a related field
11-9111	Medical and health services managers	12	17	5	42	1.14	32.30	Degree plus work experience
11-9141	Property, real estate, and community association managers	24	33	9	38	0.60	7.57	Bachelor's degree
11-9199	Managers, all other	63	85	22	35	1.12	23.68	Work experience in a related field
11-1011	Chief executives	44	58	14	32	1.13	21.28	Degree plus work experience
11-1021	General and operations managers	49	61	12	24	0.75	29.96	Degree plus work experience

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
11-1031	Legislators	11	13	2	18	4.86	7.62	Degree plus work experience
13-1111	Management analysts	18	26	8	44	0.49	12.04	Degree plus work experience
13-1199	Business operation specialists, all other	13	17	4	31	0.35	16.60	Bachelor's degree
13-2011	Accountants and auditors	29	41	12	41	0.52	12.40	Bachelor's degree
13-2052	Personal financial advisors	11	12	1	9	0.42	6.50	Bachelor's degree
21-1012	Educational, vocational, and school counselors	17	21	4	24	1.88	17.17	Master's degree
21-1015	Rehabilitation counselors	19	23	4	21	3.65	12.12	Master's degree
21-1021	Child, family, and school social workers	31	38	7	23	2.92	14.50	Bachelor's degree
21-1023	Mental health and substance abuse social workers	11	14	3	27	2.22	12.79	Master's degree
21-1092	Probation officers and correctional treatment specialists	11	14	3	27	3.34	18.49	Bachelor's degree
21-1093	Social and human service assistants	33	41	8	24	2.57	10.08	Moderate-term on-the-job training
23-1011	Lawyers	18	26	8	44	0.61	26.11	First professional degree
23-1023	Judges, magistrate judges, and magistrates	11	13	2	18	12.07	21.34	Degree plus work experience
25-1099	Postsecondary teachers	48	66	18	38	0.87	39.44	Doctoral degree

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
25-2011	Preschool teachers, except special education	17	17	0	0	0.92	9.96	Postsecondary vocational award
25-2012	Kindergarten teachers, except special education	28	37	9	32	4.12	24.16	Bachelor's degree
25-2021	Elementary school teachers, except special education	115	147	32	28	1.97	21.61	Bachelor's degree
25-2022	Middle school teachers, except special and vocational education	43	52	9	21	1.67	20.28	Bachelor's degree
25-2031	Secondary school teachers, except special and vocational education	52	62	10	19	1.35	21.85	Bachelor's degree
25-2041	Special education teachers, preschool, kindergarten, and elementary school	14	18	4	29	1.67	22.41	Bachelor's degree
25-3099	Teachers and instructors, all other	15	18	3	20	0.63	14.51	Bachelor's degree
25-9041	Teacher assistants	93	111	18	19	1.86	8.10	Short-term on-the-job training
27-4021	Photographers	20	23	3	15	0.76	10.34	Long-term on-the-job training
29-1069	Physicians and surgeons	25	35	10	40	0.84	87.09	First professional degree
29-1111	Registered nurses	55	79	24	44	0.63	24.09	Associate's degree
29-2061	Licensed practical and licensed vocational nurses	63	92	29	46	2.40	15.38	Postsecondary vocational award
31-1011	Home health aides	67	90	23	34	2.23	7.38	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
31-1012	Nursing aides, orderlies, and attendants	92	129	37	40	1.76	8.18	Postsecondary vocational award
31-9092	Medical assistants	10	17	7	70	—	—	Moderate-term on-the-job training
33-3012	Correctional officers and jailers	168	223	55	33	11.17	13.28	Moderate-term on-the-job training
33-3051	Police and sheriff's patrol officers	43	57	14	33	1.89	13.36	Long-term on-the-job training
33-9032	Security guards	13	16	3	23	0.36	6.43	Short-term on-the-job training
35-1012	First-line supervisors/managers of food preparation and serving workers	38	51	13	34	1.24	9.56	Work experience in a related field
35-2011	Cooks, fast food	62	78	16	26	2.77	6.41	Short-term on-the-job training
35-2012	Cooks, institution and cafeteria	30	37	7	23	2.05	6.49	Moderate-term on-the-job training
35-2021	Food preparation workers	20	25	5	25	0.62	7.55	Short-term on-the-job training
35-3021	Combined food preparation and serving workers, including fast food	87	118	31	36	0.98	6.57	Short-term on-the-job training
35-3031	Waiters and waitresses	32	31	-1	-3	0.38	5.94	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
37-1011	First-line supervisors/managers of housekeeping and janitorial workers	11	15	4	36	0.82	9.01	Work experience in a related field
37-1012	First-line supervisors/managers of landscaping, lawn service, and groundskeeping workers	13	19	6	46	2.36	10.77	Work experience in a related field
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	54	71	17	31	0.66	7.84	Short-term on-the-job training
37-2012	Maids and housekeeping cleaners	166	240	74	45	2.55	6.02	Short-term on-the-job training
37-2019	Building cleaning workers, all other	17	23	6	35	0.98	5.86	Short-term on-the-job training
37-3011	Landscaping and groundskeeping workers	59	85	26	44	1.59	9.04	Short-term on-the-job training
37-3012	Pesticide handlers, sprayers, and applicators, vegetation	13	21	8	62	3.54	6.61	Moderate-term on-the-job training
37-3013	Tree trimmers and pruners	11	19	8	73	3.04	6.31	Short-term on-the-job training
37-3019	Grounds maintenance workers, all other	12	19	7	58	3.32	6.21	Short-term on-the-job training
39-2011	Animal trainers	12	13	1	8	3.69	7.82	Moderate-term on-the-job training
39-2021	Nonfarm animal caretakers	18	14	-4	-22	1.39	7.01	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
39-9011	Child care workers	115	172	57	50	1.97	5.87	Short-term on-the-job training
39-9021	Personal and home care aides	78	105	27	35	2.53	8.06	Short-term on-the-job training
41-1011	First-line supervisors/managers of retail sales workers	142	180	38	27	1.78	15.24	Work experience in a related field
41-1012	First-line supervisors/managers of non-retail sales workers	30	40	10	33	0.89	12.07	Work experience in a related field
41-2011	Cashiers, except gaming	196	215	19	10	1.55	7.48	Short-term on-the-job training
41-2022	Parts salespersons	13	13	0	0	1.47	10.20	Moderate-term on-the-job training
41-2031	Retail salespersons	92	117	25	27	0.52	8.88	Short-term on-the-job training
41-3021	Insurance sales agents	45	57	12	27	1.74	7.66	Bachelor's degree
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	29	44	15	52	0.50	29.06	Moderate-term on-the-job training
41-9021	Real estate brokers	39	53	14	36	0.65	7.20	Work experience in a related field
41-9022	Real estate sales agents	43	57	14	33	0.66	7.32	Postsecondary vocational award

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
41-9091	Door-to-door sales workers, news and street vendors, and related workers	37	42	5	14	0.93	5.85	Short-term on-the-job training
43-1011	First-line supervisors/managers of office and administrative support workers	44	57	13	30	0.81	16.92	Work experience in a related field
43-3021	Billing and posting clerks and machine operators	19	27	8	42	0.99	12.07	Moderate-term on-the-job training
43-3031	Bookkeeping, accounting, and auditing clerks	69	90	21	30	0.85	10.59	Moderate-term on-the-job training
43-3071	Tellers	14	17	3	21	0.64	9.80	Short-term on-the-job training
43-4051	Customer service representatives	26	38	12	46	0.32	11.93	Moderate-term on-the-job training
43-4171	Receptionists and information clerks	21	30	9	43	0.49	9.69	Short-term on-the-job training
43-5021	Couriers and messengers	10	17	7	70	—	—	Short-term on-the-job training
43-5032	Dispatchers, except police, fire, and ambulance	16	22	6	38	2.31	10.99	Moderate-term on-the-job training
43-5052	Postal service mail carriers	13	16	3	23	1.13	18.17	Short-term on-the-job training
43-5071	Shipping, receiving, and traffic clerks	13	21	8	62	0.48	13.24	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
43-5081	Stock clerks and order fillers	31	34	3	10	0.51	8.65	Short-term on-the-job training
43-6011	Executive secretaries and administrative assistants	31	40	9	29	0.52	14.03	Moderate-term on-the-job training
43-6012	Legal secretaries	10	14	4	40	0.80	12.88	Postsecondary vocational award
43-6013	Medical secretaries	20	28	8	40	1.14	11.37	Postsecondary vocational award
43-6014	Secretaries, except legal, medical, and executive	80	93	13	16	1.11	10.87	Moderate-term on-the-job training
43-9061	Office clerks, general	98	128	30	31	0.83	9.56	Short-term on-the-job training
45-2091	Agricultural equipment operators	21	25	4	19	19.88	7.46	Moderate-term on-the-job training
45-2092	Farmworkers and laborers, crop, nursery, and greenhouse	56	68	12	21	5.21	7.20	Short-term on-the-job training
45-4022	Logging equipment operators	19	27	8	42	12.52	9.24	Moderate-term on-the-job training
47-1011	First-line supervisors/managers of construction trades and extraction workers	29	39	10	34	0.74	11.89	Work experience in a related field
47-2031	Carpenters	46	61	15	33	0.73	9.18	Long-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
47-2061	Construction laborers	25	33	8	32	0.48	8.41	Moderate-term on-the-job training
47-2073	Operating engineers and other construction equipment operators	17	23	6	35	1.13	10.68	Moderate-term on-the-job training
47-2111	Electricians	12	15	3	25	0.45	11.53	Long-term on-the-job training
47-2141	Painters, construction and maintenance	13	18	5	38	0.65	9.86	Moderate-term on-the-job training
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	15	19	4	27	0.88	17.71	Work experience in a related field
49-3023	Automotive service technicians and mechanics	24	30	6	25	0.80	13.54	Postsecondary vocational award
49-3031	Bus and truck mechanics and diesel engine specialists	18	23	5	28	1.77	12.70	Postsecondary vocational award
49-3041	Farm equipment mechanics	14	18	4	29	11.37	12.20	Postsecondary vocational award
49-9042	Maintenance and repair workers, general	62	86	24	39	1.22	13.42	Moderate-term on-the-job training
49-9098	Helpers--Installation, maintenance, and repair workers	11	16	5	45	1.85	10.20	Short-term on-the-job training
51-1011	First-line supervisors/managers of production and operating workers	28	42	14	50	1.10	27.16	Work experience in a related field

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
51-2092	Team assemblers	75	123	48	64	1.65	15.49	Moderate-term on-the-job training
51-4031	Cutting, punching, and press machine setters, operators, and tenders, metal and plastic	11	19	8	73	1.16	18.50	Moderate-term on-the-job training
51-4072	Molding, coremaking, and casting machine setters, operators, and tenders, metal and plastic	49	81	32	65	8.66	13.08	Moderate-term on-the-job training
51-8031	Water and liquid waste treatment plant and system operators	12	17	5	42	3.20	16.26	Long-term on-the-job training
51-9011	Chemical equipment operators and tenders	14	14	0	0	7.88	13.44	Moderate-term on-the-job training
51-9061	Inspectors, testers, sorters, samplers, and weighers	20	27	7	35	1.11	14.64	Moderate-term on-the-job training
51-9111	Packaging and filling machine operators and tenders	17	22	5	29	1.22	13.18	Short-term on-the-job training
51-9198	Helpers--Production workers	16	27	11	69	0.84	14.04	Short-term on-the-job training
53-1031	First-line supervisors/managers of transportation and material-moving machine and vehicle operators	10	13	3	30	—	—	Work experience in a related field
53-3022	Bus drivers, school	24	29	5	21	1.41	6.67	Short-term on-the-job training
53-3031	Driver/sales workers	42	59	17	40	1.88	10.94	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
53-3032	Truck drivers, heavy and tractor-trailer	149	188	39	26	2.17	12.82	Moderate-term on-the-job training
53-3033	Truck drivers, light or delivery services	88	119	31	35	2.08	9.85	Short-term on-the-job training
53-7051	Industrial truck and tractor operators	29	36	7	24	1.28	11.42	Short-term on-the-job training
53-7062	Laborers and freight, stock, and material movers, hand	100	137	37	37	1.14	12.30	Short-term on-the-job training
53-7064	Packers and packagers, hand	25	28	3	12	0.84	7.68	Short-term on-the-job training
53-7081	Refuse and recyclable material collectors	86	154	68	79	16.35	8.92	Short-term on-the-job training
		6,202	8,035	1,832	30		12.71	

at least
1.25 greater than \$12.71

Source: EMSI

Appendix B: Businesses by 3-Digit NAICS Codes

Lee County								
Industry	NAICS Code	2002	2007	Average Size	Change			
					#	%	SC % change	US % change
Crop Production	111	10	7	11	-3	-30.0	-17.6	-9.3
Forestry and Logging	113	8	6	9	-2	-25.0	-26.0	-15.2
Support Activities for Agriculture and Forestry	115	5	4		-1	-20.0	-13.0	1.8
Specialty Trade Contractors	238	11	10	6	-1	-9.1	-6.4	12.9
Merchant Wholesalers, Durable Goods	423	6	3		-3	-50.0	0.6	-5.6
Motor Vehicle and Parts Dealers	441	8	6	4	-2	-25.0	-11.6	2.2
Furniture and Home Furnishings Stores	442	4	3	6	-1	-25.0	-11.3	3.8
Building Material and Garden Equipment and Supplies Dealers	444	5	7	9	2	40.0	-8.8	0.9
Food and Beverage Stores	445	11	6	19	-5	-45.5	-18.2	-0.5
Health and Personal Care Stores	446	4	4	9	0	0.0	9.1	10.2
Gasoline Stations	447	21	17	8	-4	-19.0	-2.8	-1.9
Clothing and Clothing Accessories Stores	448	5	3	6	-2	-40.0	-5.3	4.6
General Merchandise Stores	452	6	5	5	-1	-16.7	17.5	13.3
Truck Transportation	484	14	15	6	1	7.1	-5.1	5.4
Support Activities for Transportation	488	3	4	16	1	33.3	-6.0	7.6
Warehousing and Storage	493	4	3		-1	-25.0	-13.8	14.5
Credit Intermediation and Related Activities	522	10	11	4	1	10.0	12.2	23.8
Insurance Carriers and Related Activities	524	4	4	6	0	0.0	0.3	6.7
Real Estate	531	6	3		-3	-50.0	18.8	23.8
Rental and Leasing Services	532	4	3		-1	-25.0	-8.3	1.7
Professional, Scientific, and Technical Services	541	10	11		1	10.0	2.1	14.3
Ambulatory Health Care Services	621	9	5	22	-4	-44.4	7.4	13.3
Nursing and Residential Care Facilities	623	5	4	71	-1	-20.0	0.4	8.8
Food Services and Drinking Places	722	15	14	15	-1	-6.7	-0.2	12.2
Repair and Maintenance	811	9	11	2	2	22.2	-18.3	-0.4
Private Households	814	16	35	1	19	118.8	4.6	24.9

growth rate exceeds both SC and US growth rates

Source: Bureau of Labor Statistics

Appendix C: Lee County Employment by Industry Sector

Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
Total		3,973	3,798	-175	-4.4			28,264	30%

<i>6 star sectors</i>									
Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
NONE									

<i>5 star sectors</i>									
Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
NONE									

<i>4 star sectors</i>									
Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
Furniture and Home Furnishings Stores	442	17	19	2	12	1.52	1	23,106	A
Building Material and Garden Equipment and Supplies Dealers	444	35	60	25	71	2.10	21	28,692	BA
Health and Personal Care Stores	446	24	36	12	50	1.66	10	29,126	BA
Private Households	814	17	33	16	94	2.75	12	7,601	A

3 star or fewer sectors		Employment		2002-2007 Change					
Industry	NAICS code	2002	2007	#	%	Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
Specialty Trade Contractors	238	52	63	11	21		3	18,324	A
Support Activities for Transportation	488	42	65	23	55		17	27,425	A
Insurance Carriers and Related Activities	524	18	22	4	22	0.47	4	34,873	BA
Ambulatory Health Care Services	621	102	109	7	7	0.91	-11	62,770	A
Nursing and Residential Care Facilities	623	270	283	13	5	4.40	-7	20,149	A
Food Services and Drinking Places	722	179	210	31	17	1.01	8	9,225	BA
Crop Production	111	57	78	21	37		23	23,596	
Forestry and Logging	113	56	53	-3	-5	37.00	4	21,972	BA
Truck Transportation	484	129	97	-32	-25	3.08	-42	30,678	BA
Food and Beverage Stores	445	128	113	-15	-12	1.82	-14	14,124	BA
Gasoline Stations	447	138	128	-10	-7	6.81	-5	15,966	BA
Credit Intermediation and Related Activities	522	49	49	0	0	0.78	-4	29,536	BA
Motor Vehicle and Parts Dealers	441	30	24	-6	-20	0.58	-6	19,510	BA
Clothing and Clothing Accessories Stores	448	24	19	-5	-21	0.58	-8	11,330	BA
General Merchandise Stores	452	32	26	-6	-19	0.39	-8	12,997	BA
Repair and Maintenance	811	20	18	-2	-10	0.66	-2	19,087	BA

Methodology and Sourcing

Projected Growth Grading Scale:

AA=above average

A=average

BA=below average

D=decline

Sectors are rated on 6 factors: 2002-2007 employment growth, 2002-2007 employment growth rate, location quotient, competitive effect, average annual wage, and projected growth.

Stars are based on: 2002-2007 employment growth of 25 or more, 2002-2007 employment growth rate greater than 0% (since total employment declined in the county), location quotient of at least 1.25, competitive effect greater than 0, average annual wage greater than \$28,264 (2007 average for all jobs in the county), and average or above average projected growth.

Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county; based on 2007 data.

Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.

Source: Bureau of Labor Statistics; projections based on data from EMSI and SC Department of Commerce.



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